

EPAF User Guide

Creating & Approving Electronic Personnel Action Forms

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LAMAR UNIVERSITY

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EPAFs: An Introduction

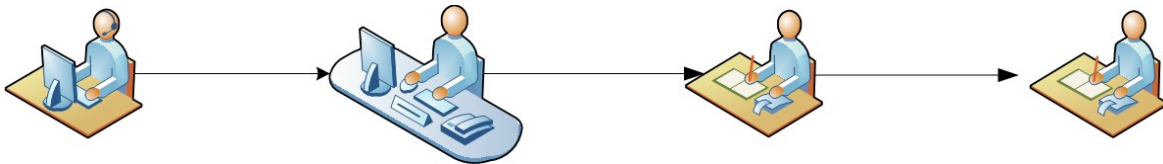
Purpose of This Guide

This user guide will assist you in completing **Electronic Personnel Action Forms*** or **EPAFs**. As an **authorized EPAF user**, you have been given access to create or approve EPAFs on behalf of your department, office, or division at Lamar University (LU). EPAF Users are of several types. The most common types are:

1. **Originators**, also called Electronic Approval Originators, who create EPAFs and submit them for approval, and
2. **Approvers**, who approve or, if necessary, send back for correction the EPAFs created by originators. Approvers may be supervisors, administrators, Human Resources or Payroll personnel, and others whose review and approval are required.

Depending on your position, you may serve as an EPAF originator, approver, or both.

EPAF Process at a Glance



Originator creates an EPAF and submits the completed EPAF for approval.

First approver reviews EPAF. If all information is correct, this person approves EPAF. Incorrect EPAFs are returned to originator for correction.

Required approvers in a predefined **Routing Queue** repeat the review, approving or returning the EPAF as needed.

Payroll Office applies EPAFs that have been approved by the EPAF deadline dates.

*EPAF terms in **boldface** are defined in the Glossary (Appendix B).

What Is an EPAF?

An **Electronic Personnel Action Form** or **EPAF** is an online form created and submitted by an authorized LU employee (**authorized EPAF user**) to request a personnel action for another LU employee. Once submitted, the EPAF is reviewed, approved, and, if approved, implemented.

EPAFs are used for many types of LU personnel actions. Examples of common personnel actions requiring an EPAF include:

- Hiring full-time staff, full-time faculty, or adjunct faculty.
- Hiring a graduate assistant, student assistant, or work study student.
- Giving One Time Pay (OTP) to a faculty or staff member.
- Processing a faculty teaching overload or summer pay for a Chair or Director.
- Ending a job assignment when an LU employee has completed a specific task or “job.”

This guide walks you through several of these personnel actions, focusing on how you, as an authorized EPAF user, can create and approve EPAFs.

What Are EPAF Approvals?

Once submitted, each EPAF personnel action must be approved at multiple levels by designated **approvers**. To streamline approvals, each EPAF action has been assigned an **Approval Category** that includes a predetermined **Routing Queue** identifying who in the organization must approve the EPAF. (Consult Appendix A for a list of Approval Categories.) Finally, EPAFs are approved by the Payroll Office and applied to an employee’s job record.

If there are problems with an EPAF, an approver can select “Return for Correction” and require the EPAF’s originator to correct the EPAF. All EPAFs must be created, approved, and applied in a timely manner so the job record can be updated prior to payroll calculation.



Timely completion of an EPAF is essential to help the Payroll Office pay an employee accurately and on time.

How to Access the EPAF System

Authorized EPAF users can access the EPAF system through their **Self-Service Banner (SSB)** account in **LU Connect**.

How to Become an Authorized EPAF User. Employees who create or approve EPAFs must first be given EPAF access. An employee's **business manager** or department head requests access by emailing the Budget Office at budget@lamar.edu. Budget approves access for qualified employees and sends this approval to IT, which sets up EPAF access for approved employees.

Once you are an authorized EPAF user, you can access the EPAF system as follows:

1. Go to the Lamar.edu and click LU Connect at the top of the page
OR
Go directly to LU Connect at luconnect.lamar.edu.
2. On the LU Connect page, click the Faculty/Staff tab, then click the Self-Service Banner (SSB) icon.
3. On the SSB page, enter your Lamar ID (often called your “L” number) and PIN to access Self-Service Banner.

Note. If you do not remember your Lamar ID or PIN or have trouble accessing Self-Service Banner, contact Lamar’s Service Desk at (409) 880-2222 or servicedesk@lamar.edu.

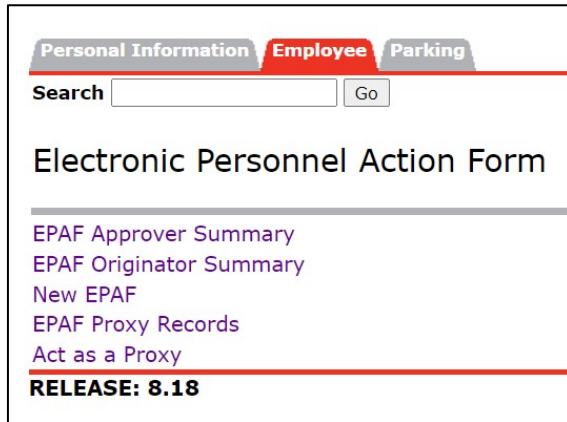
4. Once in Self-Service Banner, click the Employee tab.
5. On the Employee menu, click Electronic Personnel Action Forms to enter the EPAF system.



Note. If the EPAF link is not in your menu but you have been authorized to use EPAF, contact budget@lamar.edu for assistance.

EPAF Menu Options Explained

After entering the EPAF system, you will find several menu options:



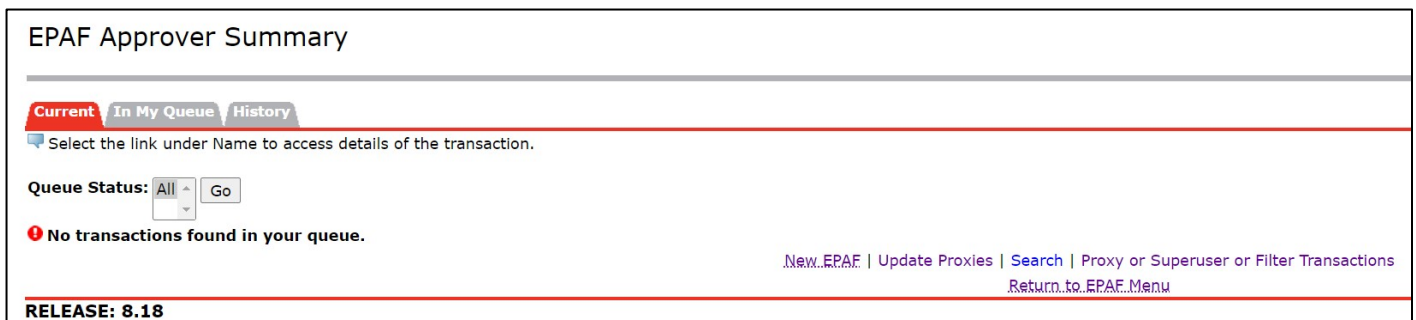
Note.
Your menu options may differ, depending on your EPAF access rights and the EPAF tasks you need to complete.



- **EPAF Approver Summary** – click to access EPAFs awaiting your approval; menu item available to those with **approver** status.
- **EPAF Originator Summary** – click to access submitted and draft EPAFs; menu item available to those with **originator** status.
- **New EPAF** – click to create a new EPAF; **originators** will use this link.
- **EPAF Proxy Records** – allows an **approver** to specify and authorize one or more users to approve EPAFs on their behalf.
- **Act as a Proxy** – allows user to act on behalf of another EPAF user, if designated as a proxy for that other user.

EPAF Approver Summary

Clicking EPAF Approver Summary on the EPAF menu will bring up the following page:



All users designated as EPAF **approvers** can access the EPAF Approver Summary page. This page contains three tabs:

- **Current** – Lists all EPAFs still needing action by an approver.
- **In My Queue** – Lists all EPAFs that have the status “In the Queue” and have yet to be processed. The Queue status will be one of the following:
 - Pending
 - FYI
 - More Information
- **History** – Lists EPAFs that have been processed. These will have one of the following statuses:
 - Approved
 - Acknowledged
 - Overridden
 - Applied
 - Disapproved
 - Returned for Correction
 - Void
 - Removed from Queue

Note.

Many of these statuses are defined in the Glossary (Appendix B).

The status options an EPAF user has may depend on the user’s EPAF access rights.

EPAF Originator Summary

Clicking EPAF Originator Summary on the EPAF menu will bring up the following page:

EPAF Originator Summary

Current History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:

No transactions found in your queue.

[New..EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)
[Return to EPAF Menu](#)

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All EPAF **originators** have access to the EPAF Originator Summary page. Here, originators can check the status of their EPAF submissions and draft EPAFs.

This page consists of two tabs:

- **Current** – Under the Current tab, users can access EPAF submissions having the following statuses:
 - All
 - Return for Correction
 - Waiting
- **History** – Under History, users can access all EPAF submissions having the following statuses:
 - Pending

- Approved
- Partially Complete
- Complete
- Disapproved
- Voided
- Canceled

New EPAF


Clicking the New EPAF link on the EPAF menu takes EPAF **originators** to pages where they can create and submit EPAFs for review and approval.

Because the EPAF system allows originators to create many different types of EPAF, the pages that originators will navigate through after clicking New EPAF will vary depending on the type of EPAF. (Consult Appendix A for a list of EPAF types or **Approval Categories**.) Regardless of type of EPAF, the first page users will reach after clicking the New EPAF link is the Person Selection screen.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: *

[EPAF Originator Summary](#)
[Return to EPAF Menu](#)

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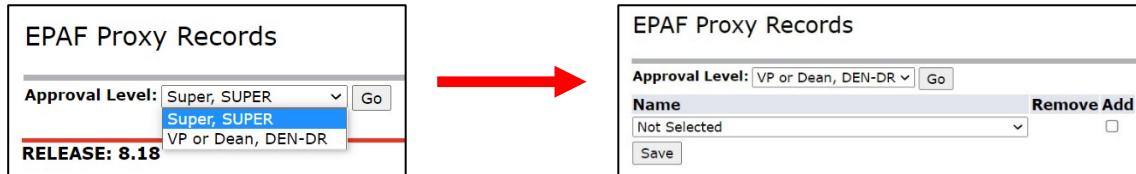
The Person Selection page is important as all EPAF actions are connected to a single person working (or soon-to-be-working) for Lamar University. Originators can select or search for a person by name. However, the Person Selection page defaults to searching for an individual by their ID or, more precisely, Lamar ID or “L” number.

Working with Lamar IDs or “L” Numbers

- Human Resources creates “L” numbers for new employees. When creating EPAFs for new hires, contact HR at hr@lamar.edu to request a new “L” number. Do *not* generate an “L” number on your own.
- Former LU employees may already have an “L” number. Contact HR for assistance when hiring a former employee who has left or separated from the university.
- LU students who become employees (during college or after graduation) will already have a student “L” number. Contact HR to change this number to employee status.

EPAF Proxy Records

Clicking EPAF Proxy Records on the EPAF menu takes **approvers** to a page where they can designate a **proxy**, one or more users who can approve EPAFs in their absence.



The proxies an EPAF user can designate depends on the number of **Approval Levels** at which this user has been set up as an approver:

- Users who approve EPAFs at one level only will be able to name one or more proxies for that single Approval Level.
- Users who approve EPAFs at multiple levels will be able to name one or more proxies for each Approval Level. Proxies do not need to be the same individual(s) across all levels but may be different individuals.

The EPAF proxy feature also allows approvers to remove or change proxies.



For security, it is critical that approvers designate as their proxies only those LU employees whom they trust and who are in their department or reporting chain.

Act as a Proxy

Clicking Act as a Proxy on the EPAF menu enables EPAF users to (1) act as a **proxy** for an **approver** who has designated them in this role, (2) act as a superuser if this role has been granted to the user; and (3) filter EPAFs to access submissions that fall within a specific date range.

All these features can be accessed by clicking Act as a Proxy to open the proxy page:

Proxy or Superuser or Filter Transactions

Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For:

Act as a Superuser:

Submitted From Date: MM/DD/YYYY

Submitted To Date: MM/DD/YYYY

Transactions Per Page:

Instructions for Creating & Approving EPAFs

What This Section Covers

This “how to” section provides instructions for completing common EPAF tasks. Not all EPAFs can be covered in this guide. The guide covers the EPAF tasks most users will likely encounter during their time at Lamar.

These tasks are:

- How to Create a Default Routing Queue
- How to Find a Position Number
- How to Do an EPAF Person Search
- How to Set Up a New EPAF
- How to Create an EPAF for:
 - One Time Pay - Staff
 - Hire - Adjunct
 - Hire - FT Faculty
 - Hire - FT Non-Exempt Staff
 - Hire - Graduate Assistant
 - Hire - Student Assistant
 - End Job Assignment
- How to Approve an EPAF
- How to Select a Proxy

What about EPAFs Not Covered in This Section?

For EPAF tasks not covered, consult the [EPAF Help](#) table in this guide to find out whom you should contact. In general:

- If your department has an assigned **business manager**, you will contact this person for assistance with EPAFs. (If you do not know whether your department has a business manager, ask your department head or administrative associate.)
- If your department does not have a business manager, email hr@lamar.edu for assistance.

What Is a Business Manager?

A **business manager** is a designated LU employee assigned to handle business and financial matters for a university division or office. Not all LU divisions or offices have a business manager. All LU Colleges have a business manager while other, non-academic offices may not have a business manager or may be in the process of acquiring one.

If your College or office has a business manager, contact this person for assistance with EPAFs. If your office does not have a business manager, email hr@lamar.edu, and your question will be directed to the person best able to assist you.

What Are the EPAF Submission Deadlines for Payroll?

- An EPAF must be at the Apply stage in the Payroll Office **at least two (2) days before payroll is run**. To determine when an EPAF is due, go to the [Payroll Office](#) web page and click the link EPAF Deadline Dates.



To take effect, an EPAF must be “applied” by the Payroll Office. An EPAF reaches the Apply stage at Payroll after it has been routed through all required reviews and approvals. For this reason, it is critical that EPAF users create, submit, review, and approve EPAFs in a timely manner. Delays in EPAFs can adversely affect personnel actions, including hiring and paying employees on time.

What Do I Do about EPAF Errors & Warnings?

While creating and submitting EPAFs, you may encounter error or warning messages. EPAF error or warning messages typically appear after you click Save during the EPAF process. Errors or warnings will be indicated at the top of the EPAF screen.

- If you receive an **EPAF warning**, you can continue through the submission process, though the warning may cause an EPAF to be returned for correction or rejected at some point during the approval process.
- If you receive an **EPAF error**, you will not be able to continue through the submission process. You must correct any errors before submitting an EPAF.

To learn more about EPAF errors and warnings and how to correct them, consult the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, consult this guide’s [EPAF Help](#) table for guidance on whom to contact.

How to Create a Default Routing Queue

When creating new EPAFs, users or **originators** will find a predefined **Routing Queue** included in each EPAF. The **Approval Levels** in each Routing Queue are mandatory to ensure that each EPAF action has been reviewed, approved, disapproved, returned for correction, or applied along the reporting chain responsible for that action. These approvals ensure careful implementation of actions that affect the university's budget.

Each type of EPAF or **Approval Category** (new hire, re-hire, stipend, etc.) has its own predefined Approval Levels. Thus, one Approval Category may require approval by an academic department, the Provost, HR, and Payroll while another category may require approval by an administrative office, Division Vice President, HR, and Payroll.

For example, here are the predefined Routing Queue and Approval Levels for an hourly worker hired through the Office of Enrollment Services:

Approval Level	User Name	Required Action
15 - (HRAPRV) HR Approver		Approve
17 - (PAYROL) Payroll		Approve
20 - (DEN-DR) VP or Dean		Approve
79 - (BUDGET) Budget		Approve
90 - (HR) Payroll - Apply		Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

For each Approval Level (HR, Payroll, etc.), the employee creating this EPAF must fill in the User Name with an authorized LU **approver**. These approvers are not random but are also predefined.

To select an approver, the EPAF originator clicks the Search icon (magnifying glass) next to a User Name field and chooses an approver from the list presented. Certain Approval Levels list one name only. Others require the originator to choose the approver best suited to the type of EPAF being created:

Approval Level	User Name
15 - (HRAPRV) HR Approver	
17 - (PAYROL) Payroll	
20 - (DEN-DR) VP or Dean	

User Names, 17 - Payroll

Tristan, Katherine M. (KMTRISTAN) -

Payroll: Approval Level with one choice only. Select this name to fill in User Name field.

VP or Dean: Approval Level with multiple choices. Select correct name to fill in User Name field.

Approval Level	User Name
15 - (HRAPRV) HR Approver	
17 - (PAYROL) Payroll	
20 - (DEN-DR) VP or Dean	
79 - (BUDGET) Budget	

User Names, 20 - VP or Dean

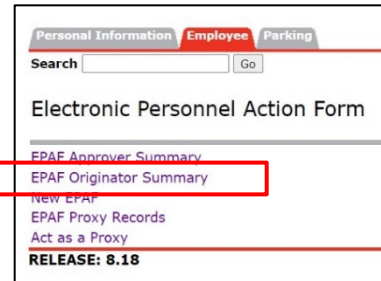
Alltop, Jeremy (JALLTOP)
 Almqvist, Arne J. (AALMQUIST)
 Bahrim, Cristian (CBAHRIM)
 Bellard, Norman J. (BELLARDNJ)
 Bello-Ogunu, John O. (JBELLOOGUNU)
 Born, Marco (MBORN)
 Brent, Katrina M. (KMWAPPLER)

What Is a Default Routing Queue?

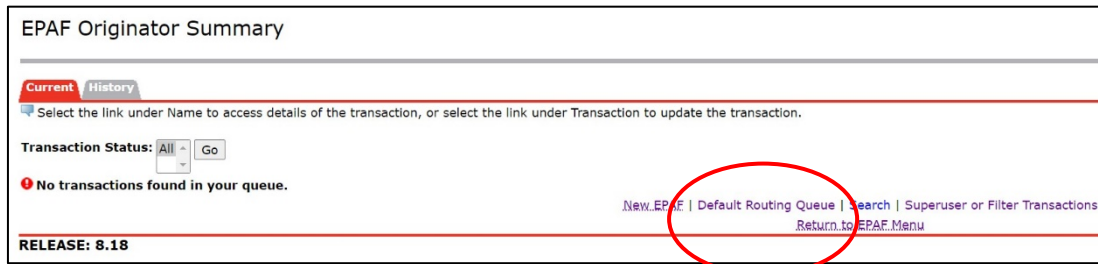
If you create only one or two EPAFs per year, then it makes sense to select **approvers** for the **Routing Queue** each time you create that rare EPAF. However, what if you must create 30 or more EPAFs each year to hire student workers for your office? It is unlikely you would want to select approvers each time you create a student worker EPAF.

Default Routing Queues offer a way around this problem by allowing you to select the correct approvers once and save your choices. That way, each time you create an EPAF to hire a student worker, your new EPAF's Routing Queue will appear pre-filled with the names from your Default Routing Queue. You can set up a Default Routing Queue for each type of EPAF (**Approval Category**) you will regularly create, saving you time in the long run.

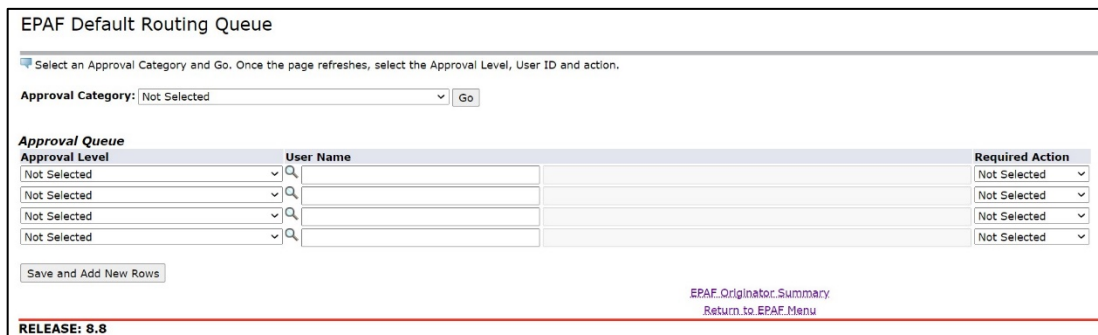
1. To set up a Default Routing Queue, first select EPAF Originator Summary from the main EPAF menu.



2. After the Originator Summary page appears, click the link Default Routing Queue at the bottom of the page.



3. The EPAF Default Routing Queue page will appear.



- Next, click the down arrow next to Approval Category and select the category for which you want to set up a Default Routing Queue. (This example uses “Hire – Adjunct.”) Then, click Go.

EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level

Approval Category: Hire - Adjunct, ADJREH

Approval Queue

Not Selected	Not Selected
Not Selected	Change - Exempt Staff Salary, STRTCH
Not Selected	Change - Faculty Salary, FACSAL
Not Selected	Change - Funding Source, FUNDS
Not Selected	End Job Assignment, TERMJB
Not Selected	Hire - Adjunct, ADJREH
Not Selected	Hire - Faculty Teaching Overload, FAOVER
Not Selected	Hire - FT Exempt Staff, JOBMS
Not Selected	Hire - FT Faculty, JOBFA
Not Selected	Hire - FT Non-Exempt Staff, JOBBW
Not Selected	Hire - Graduate Assistant, GRRH98
Not Selected	Hire - Research Assistant, REASR3
Not Selected	Hire - Resident Assistant, RESDR1

- After you click Go, the predefined Approval Levels for “Hire – Adjunct” will appear in the Approval Level fields. Also note each approver’s Required Action on the page’s right side.

EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Hire - Adjunct, ADJREH

Approval Queue	Approval Level	User Name	Required Action
3 - (ACAFFR) Academic Affairs Review	3 - (ACAFFR) Academic Affairs Review		Approve
10 - (DEPT) Department	10 - (DEPT) Department		Approve
15 - (HRAPRV) HR Approver	15 - (HRAPRV) HR Approver		Approve
17 - (PAYROL) Payroll	17 - (PAYROL) Payroll		Approve
20 - (DEN-DR) VP or Dean	20 - (DEN-DR) VP or Dean		Approve
43 - (VPREVI) Provost Review	43 - (VPREVI) Provost Review		Approve
50 - (PROVST) Provost	50 - (PROVST) Provost		Approve
79 - (BUDGET) Budget	79 - (BUDGET) Budget		Approve
90 - (HR) Payroll - Apply	90 - (HR) Payroll - Apply		Apply
Not Selected	Not Selected		Not Selected
Not Selected	Not Selected		Not Selected
Not Selected	Not Selected		Not Selected
Not Selected	Not Selected		Not Selected

✓ Mandatory Levels defaulted from Electronic Approval Category Form (NTRCAT).

- Now, select the correct approver for each Approval Level by clicking the Search icon (magnifying glass) next to that Approval Level to open up a list of employees who are authorized approvers for that level. If the list contains only one name, select that name.

Routing Queue

Approval Level	User Name
15 - (HRAPRV) HR Approver	
17 - (PAYROL) Payroll	
20 - (DEN-DR) VP or Dean	

User Names, 17 - Payroll

Tristan, Katherine M. (KMTRISTAN)

- If the list contains multiple names, select the correct name for the EPAF you are creating. For example, if you are creating an EPAF to hire an adjunct faculty member for the College of Arts & Sciences, you would select the Dean for that College. If you are unsure which names to select, contact your business manager or email hr@lamar.edu.

For rows marked **Not Selected**, avoid adding new Approval Levels, Approver names & Required Actions unless instructed to do so by your business manager or senior administrator.



Approval Queue		User Names, 20 - VP or Dean
Approval Level	User Name	
3 - (ACAFFR) Academic Affairs Review	<input type="text"/>	Haselbach, Liv M. (LHASELBACH)
10 - (DEPT) Department	<input type="text"/>	Hefner-Babb, Theresa S. (STOREY)
15 - (HRAPRV) HR Approver	<input type="text"/>	Holtzhausen, Derina R. (DHOLTZHAUSEN)
17 - (PAYROL) Payroll	<input type="text"/>	Kalb, Thomas J. (TKALB)
20 - (DEN-DR) VP or Dean	<input type="text"/>	Larson, Jamie S. (JLARSON)
43 - (VPREVI) Provost Review	<input type="text"/>	Lei, Xiangyang (XLEI)
50 - (PROVST) Provost	<input type="text"/>	Lin, Che-Jen J. (LINCX)
79 - (BUDGET) Budget	<input type="text"/>	Martin, David E. (DMARTIN28)
90 - (HR) Payroll - Apply	<input type="text"/>	Maurer, Lynn (LMAURER)
Not Selected	<input type="text"/>	McNeil, Vicki L. (VMCNEIL)
Not Selected	<input type="text"/>	Nichols, Brenda S. (NICHOLSBS)
Not Selected	<input type="text"/>	Petit, Angela V. (APETIT)
Not Selected	<input type="text"/>	Sanchez, Anthony (ASANCHEZ95)
Not Selected	<input type="text"/>	Spina, Robert J. (RSPINA)
Not Selected	<input type="text"/>	Stewart, Sean P. (STEWARTS)

- After selecting correct approvers for all Approval Levels, click Save and Add New Rows at the bottom of the page. In the future, when you create a new EPAF for an adjunct faculty member, your Default Routing Queue will be imported into your new EPAF, saving you the trouble of having to select approver names each time you hire adjunct faculty.

Note!

When creating Default Routing Queues, it is critical that you select the correct approver name for each Approval Level. Incorrect information will delay processing personnel actions, including hiring or paying employees on time.

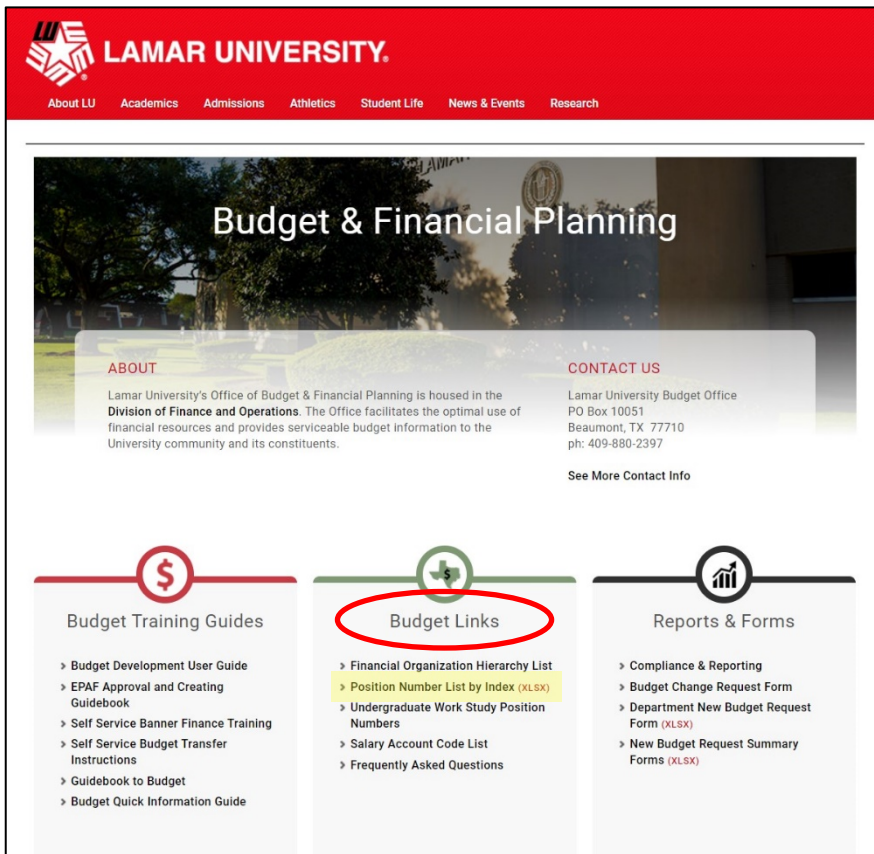
If you have any doubts about which names to select, reach out to your business manager or email hr@lamar.edu.

How to Find a Position Number

EPAFs are used for many personnel actions, including paying stipends, changing an employee’s salary, and hiring faculty, staff, and student workers. (Consult Appendix A for a list of personnel actions covered by Lamar’s EPAF system.) For all EPAFs, you will need the **position number** attached to the personnel action you wish to complete.

For example, what if you must create an EPAF to provide an imaginary faculty member, Dr. Edgar Ortiz, with a One Time Pay (OTP) through the Office of the Provost? To complete this action in EPAF, you will need the position number for a One Time Pay through the Provost’s Office. This section explains how to find a position number.

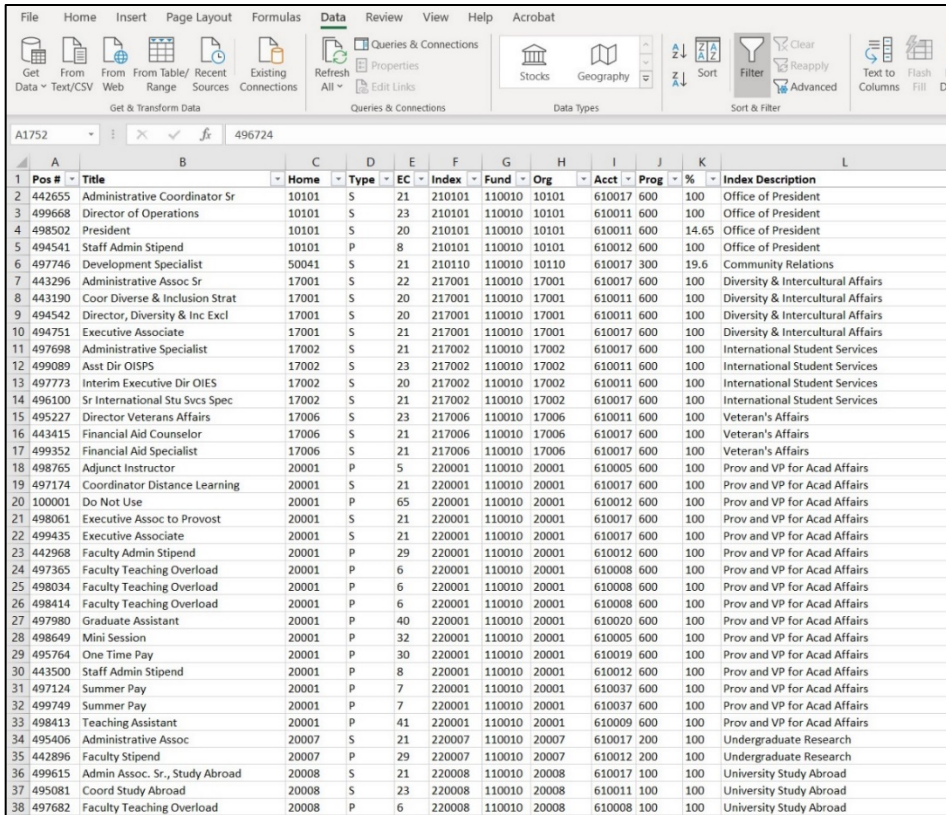
1. To find a position number, first go to the [LU Budget Office](#) web page.
2. On the Budget page, under Budget Links, click Position Number List by Index.



Note.

The Position Number List link opens an Excel spreadsheet. After you click the link, the way you open the sheet will depend on the browser you are using. If you have trouble opening the sheet, contact Lamar’s Service Desk at (409) 880-2222 or servicedesk@lamar.edu.

3. After the spreadsheet opens, the following screen will appear:



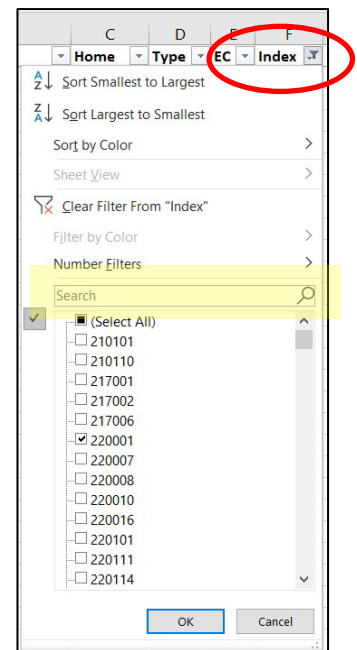
Pos #	Title	Home	Type	EC	Index	Fund	Org	Acct	Prog	%	Index Description
2	442655 Administrative Coordinator Sr	10101	S	21	210101	110010	10101	610017	600	100	Office of President
3	499668 Director of Operations	10101	S	23	210101	110010	10101	610011	600	100	Office of President
4	498502 President	10101	S	20	210101	110010	10101	610011	600	14.65	Office of President
5	494541 Staff Admin Stipend	10101	P	8	210101	110010	10101	610012	600	100	Office of President
6	497746 Development Specialist	50041	S	21	210110	110010	10110	610017	300	19.6	Community Relations
7	443296 Administrative Assoc Sr	17001	S	22	217001	110010	17001	610017	600	100	Diversity & Intercultural Affairs
8	443190 Coor Diverse & Inclusion Strat	17001	S	20	217001	110010	17001	610011	600	100	Diversity & Intercultural Affairs
9	494542 Director, Diversity & Inc Excl	17001	S	20	217001	110010	17001	610011	600	100	Diversity & Intercultural Affairs
10	494751 Executive Associate	17001	S	21	217001	110010	17001	610017	600	100	Diversity & Intercultural Affairs
11	497698 Administrative Specialist	17002	S	21	217002	110010	17002	610017	600	100	International Student Services
12	499089 Asst Dir OISPS	17002	S	23	217002	110010	17002	610011	600	100	International Student Services
13	497773 Interim Executive Dir OIES	17002	S	20	217002	110010	17002	610011	600	100	International Student Services
14	496100 Sr International Stu Svcs Spec	17002	S	21	217002	110010	17002	610017	600	100	International Student Services
15	495227 Director Veterans Affairs	17006	S	23	217006	110010	17006	610011	600	100	Veteran's Affairs
16	443415 Financial Aid Counselor	17006	S	21	217006	110010	17006	610017	600	100	Veteran's Affairs
17	499352 Financial Aid Specialist	17006	S	21	217006	110010	17006	610017	600	100	Veteran's Affairs
18	498765 Adjunct Instructor	20001	P	5	220001	110010	20001	610005	600	100	Prov and VP for Acad Affairs
19	497174 Coordinator Distance Learning	20001	S	21	220001	110010	20001	610017	600	100	Prov and VP for Acad Affairs
20	100001 Do Not Use	20001	P	65	220001	110010	20001	610012	600	100	Prov and VP for Acad Affairs
21	498061 Executive Assoc to Provost	20001	S	21	220001	110010	20001	610017	600	100	Prov and VP for Acad Affairs
22	499435 Executive Associate	20001	S	21	220001	110010	20001	610017	600	100	Prov and VP for Acad Affairs
23	442968 Faculty Admin Stipend	20001	P	29	220001	110010	20001	610012	600	100	Prov and VP for Acad Affairs
24	497365 Faculty Teaching Overload	20001	P	6	220001	110010	20001	610008	600	100	Prov and VP for Acad Affairs
25	498034 Faculty Teaching Overload	20001	P	6	220001	110010	20001	610008	600	100	Prov and VP for Acad Affairs
26	498414 Faculty Teaching Overload	20001	P	6	220001	110010	20001	610008	600	100	Prov and VP for Acad Affairs
27	497980 Graduate Assistant	20001	P	40	220001	110010	20001	610020	600	100	Prov and VP for Acad Affairs
28	498649 Mini Session	20001	P	32	220001	110010	20001	610005	600	100	Prov and VP for Acad Affairs
29	495764 One Time Pay	20001	P	30	220001	110010	20001	610019	600	100	Prov and VP for Acad Affairs
30	443500 Staff Admin Stipend	20001	P	8	220001	110010	20001	610012	600	100	Prov and VP for Acad Affairs
31	497124 Summer Pay	20001	P	7	220001	110010	20001	610037	600	100	Prov and VP for Acad Affairs
32	499749 Summer Pay	20001	P	7	220001	110010	20001	610037	600	100	Prov and VP for Acad Affairs
33	498413 Teaching Assistant	20001	P	41	220001	110010	20001	610009	600	100	Prov and VP for Acad Affairs
34	495406 Administrative Assoc	20007	S	21	220007	110010	20007	610017	200	100	Undergraduate Research
35	442896 Faculty Stipend	20007	P	29	220007	110010	20007	610012	200	100	Undergraduate Research
36	499615 Admin Assoc. Sr., Study Abroad	20008	S	21	220008	110010	20008	610017	100	100	University Study Abroad
37	495081 Coord Study Abroad	20008	S	23	220008	110010	20008	610011	100	100	University Study Abroad
38	497682 Faculty Teaching Overload	20008	P	6	220008	110010	20008	610008	100	100	University Study Abroad

In this spreadsheet, you must find the position number for One Time Pay through the Office of the Provost.

As there are 4000+ position numbers, grouped by distinct index number and department, you must find the precise position number you need – in this case, One Time Pay through the Office of the Provost.

- The best way to find the correct position number is to filter for the index number under which the personnel action will be paid. For example, if you know Dr. Ortiz will receive his One Time Pay under index number 220001 in the Office of the Provost, filter for index number 220001. (If you do not know your department's index numbers, or which department index number to use, contact your **business manager** or hr@lamar.edu.)
- To filter for index number 220001, click the down arrow next to the heading Index at the top of the sheet. The filter box will open.
- In the Search field, enter 220001, and click OK.

Note. If there is no down arrow next to Index, click the **Data** tab at the top of the sheet, then click the **Filter** icon. The down arrow will appear next to Index.



7. Filtering for index 220001, Excel will capture the position numbers attached to this index number. On the filtered list, search under Title to find the correct personnel action – One Time Pay.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Pos #	Title	Home	Type	EC	Index	Fund	Org	Acct	Prog	%	Index Description
18	498765	Adjunct Instructor	20001	P	5	220001	110010	20001	610005	600	100	Prov and VP for Acad Affairs
19	497174	Coordinator Distance Learning	20001	S	21	220001	110010	20001	610017	600	100	Prov and VP for Acad Affairs
20	100001	Do Not Use	20001	P	65	220001	110010	20001	610012	600	100	Prov and VP for Acad Affairs
21	498061	Executive Assoc to Provost	20001	S	21	220001	110010	20001	610017	600	100	Prov and VP for Acad Affairs
22	499435	Executive Associate	20001	S	21	220001	110010	20001	610017	600	100	Prov and VP for Acad Affairs
23	442968	Faculty Admin Stipend	20001	P	29	220001	110010	20001	610012	600	100	Prov and VP for Acad Affairs
24	497365	Faculty Teaching Overload	20001	P	6	220001	110010	20001	610008	600	100	Prov and VP for Acad Affairs
25	498034	Faculty Teaching Overload	20001	P	6	220001	110010	20001	610008	600	100	Prov and VP for Acad Affairs
26	498414	Faculty Teaching Overload	20001	P	6	220001	110010	20001	610008	600	100	Prov and VP for Acad Affairs
27	497980	Graduate Assistant	20001	P	40	220001	110010	20001	610020	600	100	Prov and VP for Acad Affairs
28	498649	Mini Session	20001	P	32	220001	110010	20001	610005	600	100	Prov and VP for Acad Affairs
29	495764	One Time Pay	20001	P	30	220001	110010	20001	610019	600	100	Prov and VP for Acad Affairs
30	443500	Staff Admin Stipend	20001	P	8	220001	110010	20001	610012	600	100	Prov and VP for Acad Affairs
31	497124	Summer Pay	20001	P	7	220001	110010	20001	610037	600	100	Prov and VP for Acad Affairs
32	499749	Summer Pay	20001	P	7	220001	110010	20001	610037	600	100	Prov and VP for Acad Affairs
33	498413	Teaching Assistant	20001	P	41	220001	110010	20001	610009	600	100	Prov and VP for Acad Affairs

8. Next, under **Position Number (Pos #)**, find the position number that corresponds to One Time Pay. This number is **495764**.
9. Finally, make a note of this position number (495764) as you will need it to create an EPAF for One Time Pay for Dr. Ortiz.

	A	B
1	Pos #	Title
18	498765	Adjunct Instructor
19	497174	Coordinator Distance Learning
20	100001	Do Not Use
21	498061	Executive Assoc to Provost
22	499435	Executive Associate
23	442968	Faculty Admin Stipend
24	497365	Faculty Teaching Overload
25	498034	Faculty Teaching Overload
26	498414	Faculty Teaching Overload
27	497980	Graduate Assistant
28	498649	Mini Session
29	495764	One Time Pay
30	443500	Staff Admin Stipend
31	497124	Summer Pay
32	499749	Summer Pay
33	498413	Teaching Assistant

Note!

It is critical that users enter accurate information into EPAFs – correct index number, position number, personnel action/Approval Category, department paying for the action, etc. Incorrect information will cause errors in processing important personnel actions, including hiring and paying employees.

If you have any doubts about the accuracy of your information, reach out to your business manager or email hr@lamar.edu.

How to Do an EPAF Person Search

On the main EPAF menu, clicking the New EPAF link takes users to an area where they can create EPAFs. Regardless of type of EPAF, the first page that users will reach after clicking New EPAF is the Person Selection screen:

This page enables users to search for the specific employee for whom they are creating an EPAF.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

ID: * 🔍

Query Date: MM/DD/YYYY*


Approval Category: *

[EPAF Originator Summary](#)
[Return to EPAF Menu](#)

RELEASE: 8.18

There are two ways (by Lamar ID or name) to search for an LU employee using Person Selection:

1. First, if you know the employee’s **Lamar ID** (often called an **“L” number**), enter this ID into the ID field. (*Note.* Remember to begin the ID with a capital L and to enter the number accurately as an incorrect number will cause the search to fail.)



If you encounter any problems with Lamar IDs or “L” numbers (incorrect numbers, missing numbers, etc.), contact Human Resources at hr@lamar.edu.

This example uses the Lamar ID for an imaginary employee, Dr. Edgar Ortiz, who will receive One Time Pay from the Office of the Provost.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

ID: * 🔍

Query Date: MM/DD/YYYY*

Approval Category: *

Hit the Enter key or click anywhere on the Person Selection screen. The employee’s name will appear. Now, you are ready to create a new EPAF for Dr. Ortiz’s One Time Pay.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

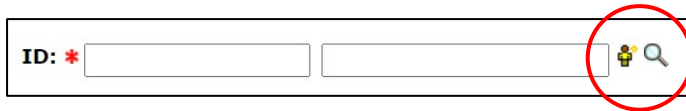
* - indicates a required field.

ID: * 🔍

Query Date: MM/DD/YYYY*

Approval Category: *

- Second, if you do not know the employee’s Lamar ID, search for the employee by clicking the Search icon (magnifying glass) on the Person Selection screen.



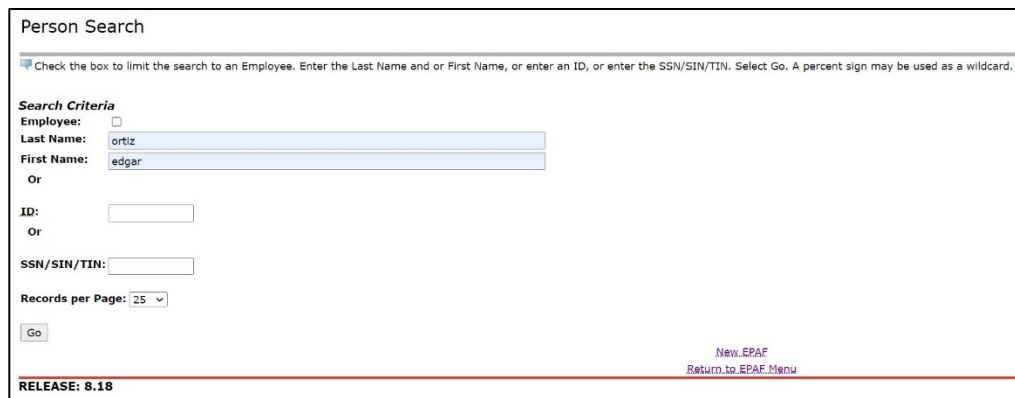
The screenshot shows a form with an "ID: *" label followed by two input fields. To the right of the second input field is a magnifying glass icon, which is circled in red. There is also a person icon next to the magnifying glass.

Click the magnifying glass to search for an employee by name.



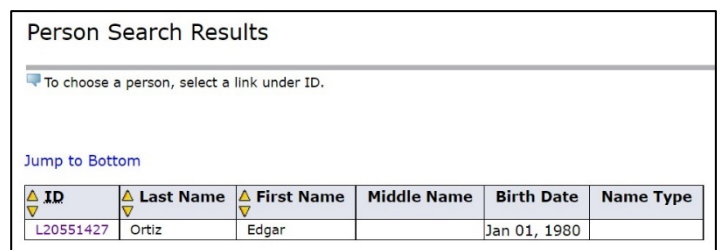
Do **NOT** click the “person” icon next to the magnifying glass. This icon is used to generate Lamar IDs (“L” numbers) for employees. Generating IDs is handled by HR and not through EPAFs. If you accidentally click the “person” icon and generate an ID number, end your EPAF session. For assistance with “L” numbers, contact hr@lamar.edu.

- After you click the Search icon, the Person Search page will appear. Enter the name of the LU employee for whom you wish to search. Then, click Go.



The screenshot shows the "Person Search" page. It includes a search criteria section with fields for Last Name (ortiz), First Name (edgar), ID, and SSN/SIN/TIN. There is a "Go" button and a "Records per Page" dropdown set to 25. At the bottom, there are links for "New EPAF" and "Return to EPAF Menu".

- Clicking Go will take you to a Results page that lists the employee and Lamar ID (“L” number).

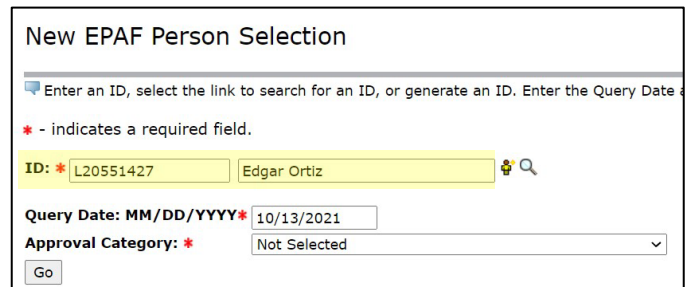


The screenshot shows the "Person Search Results" page. It contains a table with the following data:

ID	Last Name	First Name	Middle Name	Birth Date	Name Type
L20551427	Ortiz	Edgar		Jan 01, 1980	

- Click the ID number.

- Clicking the ID number will take you back to the Person Selection screen, where you will find Dr. Ortiz’s full information. Now, you are ready to create a new EPAF for Dr. Ortiz’s One Time Pay from the Provost’s Office.



The screenshot shows the "New EPAF Person Selection" page. It includes a search criteria section with fields for ID (L20551427), Name (Edgar Ortiz), Query Date (10/13/2021), and Approval Category (Not Selected). There is a "Go" button.

How to Set Up a New EPAF

Regardless of the type of EPAF you create, you must first set up the EPAF by completing the New EPAF Person Selection and New EPAF Job Selection steps.

1. On the main EPAF menu, click New EPAF. When the Person Selection screen appears, search for the employee for whom you are creating this EPAF. (**Note.** If you need help accessing the Person Selection screen or searching for an employee, review [How to Access the EPAF System](#), [EPAF Menu Options Explained](#), and [How to Do an EPAF Person Search](#).)



For important information about **Lamar IDs (“L” numbers)**, review the following sections of this guide: [Working with Lamar IDs or “L” Numbers](#) and [How to Do an EPAF Person Search](#). Do NOT generate “L” numbers on your own. Contact your business manager or hr@lamar.edu for assistance.

2. After you have found the correct employee, make sure the Person Selection screen includes both employee name and “L” number.

3. Next:

- Enter **Query Date***
- Select correct **Approval Category** (type of EPAF).
- Click Go.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date

* - indicates a required field.

ID: * 🔍

Query Date: MM/DD/YYYY*

Approval Category: *

⚠️ There are no active jobs based on the Query Date.

***QUERY DATE** is the date the EPAF takes effect and becomes active, and **NOT** the date you create the EPAF. In rare cases, this date may be in the past if employee began working before EPAF was submitted. Always clear these back-dated (retro pay) situations with your business manager or HR (hr@lamar.edu).

- The New EPAF Job Selection page will appear.

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: John Doe, L20551430
Query Date: Mar 01, 2022
Approval Category: One Time Pay - Staff, OTP4

One Time Pay, OTP

Search	Type	Position	Suffix	Title	Time Sheet Organization	Sta
<input type="text" value=""/>	New Job	496753	00	One Time Pay	20141, TX Academy Leadership in Humanity	


⚠ There are no active jobs based on the Query Date.

- Under Position, enter correct **position number**. (Review [How to Find a Position Number](#), if needed).
- After you enter position number, most fields on the Job Selection screen will populate automatically. However, you will need to enter Suffix.
- To enter Suffix, first click the All Jobs button on this screen. All Jobs calls up all previous jobs/EPAFs connected to this employee AND this position number (i.e., this employee previously worked under this position number).
 - If there are **no** previous jobs/EPAFs connected to this employee and position number, a message will appear stating there are no jobs. Enter **00** under Suffix.
 - If there are previous jobs/EPAFs connected to this employee and position number, a list will appear of all previous jobs/EPAFs connected to this employee and position number. Count the previous jobs. Then, under Suffix, enter the next job or “Suffix” in the sequence (example: one previous job, then Suffix is **01**; two previous jobs, Suffix is **02**; etc.).
- Finally, click Go. On the next screen, you will finish creating the new EPAF.

The following sections walk you through creating the most common types (**Approval Categories**) of EPAF you are likely to encounter. For EPAFs not covered in this guide, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “One Time Pay – Staff”

During the fiscal year, you may be asked to enter One Time Pay (OTP) for a staff or faculty member. This amount is in addition to the employee’s regular salary. This example walks you through creating an EPAF for OTP for a staff member.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the One Time Pay EPAF. Note the following:

Name and ID: John Doe, L20551430
Transaction: Query Date: Dec 01, 2021
Transaction Status:
Approval Category: One Time Pay - Staff, OTP4

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* - indicates a required field.

One Time Pay, 496753-00 One Time Pay

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Primary-Sec-OverId: (Not Enterable)		<input type="text" value="0"/>
Pay Effective Date: MM/DD/YYYY		<input type="text"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Annual Salary:		<input type="text"/>
Hourly Rate: (Not Enterable)		<input type="text" value="0"/>
FTE: *(Not Enterable)		<input type="text" value="0"/>
Factor: *(Not Enterable)		<input type="text" value="1"/>
Pays: *(Not Enterable)		<input type="text" value="1"/>
Job Change Reason:		<input type="text" value="L, Reappointment"/>

End Job, 496753-00 One Time Pay

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Job Change Reason: *		<input type="text" value="P, End of Assignment"/>

Remember! Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.

- Certain fields will be Not Enterable &/or pre-populated.
- Job Begin Date, Pay Effective Date & Personnel Date will all match the Query Date.
- Annual Salary: Total amount of One Time Pay & **not** the employee’s annual salary.
- Job Change Reason: Leave as is (L, Reappointment)
- Pay Effective Date & Personnel Date are same date. Both are last day of month in which One Time Pay is paid.
- Job Change Reason: Leave as is (P, End of Assignment)

Routing Queue

Approval Level	User Name
15 - (HRAPRV) HR Approver	<input type="text"/>
17 - (PAYROL) Payroll	<input type="text"/>
20 - (DEN-DR) VP or Dean	<input type="text"/>
79 - (BUDGET) Budget	<input type="text"/>
90 - (HR) Payroll - Apply	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>

Comment

Approve

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- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.

- You may leave a comment in the Comment box.

- Remember to **SAVE** your work, or it will be lost.

2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete your work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “Hire – Adjunct”

You may be asked to create an EPAF to hire or re-hire an adjunct faculty member. This example walks you through the steps to create an EPAF for adjunct faculty.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the EPAF to hire or re-hire an adjunct faculty member. Note the following:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Caroline Smith, L20551445

Transaction: **Query Date:** Jan 01, 2022

Transaction Status:

Approval Category: Hire - Adjunct, ADJREH

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* - indicates a required field.

Create or Change Employee Record

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code:	05, Adjunct Faculty	<input type="text" value="05"/>
Home Organization:	20551, Mathematics	<input type="text"/>
Distribution Orgn:	20551, Mathematics	<input type="text"/>

Multiple Courses. If an adjunct faculty member is teaching more than one course, you will need to submit an EPAF for each course.

Remember! Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.

“L” Number:

- If this adjunct faculty member has worked for LU in the past, she should already have an “L” number.
- If this adjunct faculty member is a new hire (never worked at LU before), she may not have a Lamar ID or “L” number. Contact HR (hr@lamar.edu) for an “L” number.
- If this adjunct faculty member is or was an LU student, she may already have a student “L” number. However, contact HR to activate this person as an employee. A student “L” number will not work for an EPAF.

- Certain fields will be Not Enterable &/or pre-populated.
- Home Org and Distribution Orgn are the department hiring the adjunct faculty member. In this example, the department is already listed (20551, Mathematics). Nevertheless, type the five-digit Org Code (20551) directly into the field, or click the Search icon (magnifying glass) to select this Org Code from the search list.

Questions? Contact your College business manager.

Create a New Job, 497387-00 Adjunct Instructor

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		01/01/2022
Accrue Leave: (Not Enterable)		
Primary-Sec-Overld:		Primary
Pay Effective Date: MM/DD/YYYY		01/01/2022
Personnel Date: MM/DD/YYYY		01/01/2022
Title: (Not Enterable)		
Annual Salary:		
Hourly Rate: (Not Enterable)		
Timesheet Orgn:		
Factor: *		
Pays: *		
Hours per Day: *		
Job Status: (Not Enterable)	A	
FTE: *		
Job Change Reason:	Not Selected	

End Job, 497387-00 Adjunct Instructor

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY*		
Personnel Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)	T	
Job Change Reason: *	P, End of Assignment	

Under “Create a New Job”:

- Job Begin Date, Pay Effective Date & Personnel Date will all match the Query Date.
- Primary, Secondary & Overload: Review **Job Status** in Glossary.
- Annual Salary is total amount paid to adjunct to teach course.
- Timesheet Orgn is typically the department paying adjunct faculty member’s salary. However, since adjunct faculty may be paid from different sources (dept, College, etc.), check with your business manager for clarification.
- Factor & Pays are the number of pay periods during the employee’s contract. Pay periods vary depending on course & length of course/term. Contact your business manager to clarify as needed.
- Hours per Day & FTEs (Full Time Equivalents) vary depending on course, term & how many courses/jobs the employee has with LU. Contact your business manager to determine Hours per Day & FTEs.
- Job Change Reason: New Hire or Re-Hire (depending on whether adjunct faculty member has worked for LU before).

Under “End Job”:

- Pay Effective Date & Personnel Date are date on which adjunct faculty member’s contract ends.
- Job Change Reason: End of Assignment

Routing Queue

Approval Level	User Name
3 - (ACAFFR) Academic Affairs Review	<input type="text"/>
10 - (DEPT) Department	<input type="text"/>
15 - (HRAPRV) HR Approver	<input type="text"/>
17 - (PAYROL) Payroll	<input type="text"/>
20 - (DEN-DR) VP or Dean	<input type="text"/>
43 - (VPREVI) Provost Review	<input type="text"/>
50 - (PROVST) Provost	<input type="text"/>
79 - (BUDGET) Budget	<input type="text"/>
90 - (HR) Payroll - Apply	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>

Comment

Approve

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- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should already be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.

- You may leave a comment in the Comment box.

- Remember to **SAVE** your work, or it will be lost.

2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete your work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “Hire - FT Faculty”

You may be asked to create an EPAF to hire a full-time faculty member. This example walks you through the steps to create an EPAF for full-time faculty.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the EPAF to hire a full-time faculty member. Note the following:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Carol Cox, L20551444

Transaction: **Query Date:** Jan 01, 2022

Transaction Status:

Approval Category: Hire - FT Faculty, JOBFA

Approval Ty

[Jump to Bottom](#)

Create a New Faculty Job, 442790-00 Instructor

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY		<input type="text"/>
Primary-Sec-Overld: (Not Enterable)	P	<input type="text"/>
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Contract Begin Date: MM/DD/YYYY		<input type="text"/>
Contract End Date: MM/DD/YYYY		<input type="text"/>
Employee Class Code:	01	<input type="text"/>
Annual Salary:		<input type="text"/>
Timesheet Orgn:		<input type="text"/>
Job Status: (Not Enterable)	A	<input type="text"/>
Job Change Reason:	Not Selected	<input type="text"/>
Factor: (Not Enterable)	9	<input type="text"/>
Pays: (Not Enterable)	9	<input type="text"/>

Remember! Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF. For FT faculty, Query date will be 09/01 or 01/01.

“L” Number:

- If this faculty member has worked for LU in the past (for ex, as adjunct), she should already have an “L” number.
- If this faculty member is a new hire (never worked at LU before), she may not have a Lamar ID or “L” number. Contact HR (hr@lamar.edu) for an “L” number.
- If this faculty member is or was an LU student, she may already have a student “L” number. However, contact HR to activate this person as an employee. A student “L” number will not work for an EPAF.
- Certain fields will be Not Enterable &/or pre-populated.
- Pay Effective Date, Job Begin Date, & Contract Begin Date will all match Query Date. For FT faculty, this date will be 09/01 or 01/01.
- Contract End Date is date contract officially ends.
- Annual Salary is full contract amount, not half even if FT faculty begins mid-academic year (01/01).

- Timesheet Orgn is the department this FT faculty member is joining.
- Job Change Reason is New Hire for a new FT faculty member. Contact your College business manager if faculty has worked for LU before.
- Factor & Pays are pre-populated for 9-month salary for FT faculty member. Do not change. Although FT faculty can request a 12-month distribution of salary, the EPAF does not serve this purpose.

Display Labor Distribution, 442790-00 Instructor

Current
Effective Date: 01/01/2022

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 01/01/2022

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
L	220611	110010	20611	610007	100					100.00			
Total:										100.00			

✓ Job Labor Distributions defaulted from the working Position Labor Distributions for fiscal year 2022, position 442790.
Default from Index | Save and Add New Rows

- Do not change the settings in the Labor Distribution table.

Routing Queue

Approval Level	User Name
3 - (ACAFFR) Academic Affairs Review	
10 - (DEPT) Department	
15 - (HRAPRV) HR Approver	
17 - (PAYROL) Payroll	
20 - (DEN-DR) VP or Dean	
43 - (VPREVI) Provost Review	
50 - (PROVST) Provost	
79 - (BUDGET) Budget	
90 - (HR) Payroll - Apply	
Not Selected	
Not Selected	
Not Selected	
Not Selected	

Save and Add New Rows

Comment

Save

Return to Top

Approval Types | A

- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should already be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.
- You may leave a comment in the Comment box.
- Remember to **SAVE** your work, or it will be lost.


2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete your work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “Hire - FT Non-Exempt Staff”

You may be asked to create an EPAF to hire a full-time non-exempt staff member. Non-exempt staff are employees subject to the wage and overtime provisions of the Fair Labor Standards Act (FLSA). Although non-exempt employees are often hourly employees, non-exempt employees may be paid on an hourly, salary, or other basis. This example walks you through the steps to create an EPAF for a full-time non-exempt staff member.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the EPAF to hire a full-time non-exempt staff member. Note the following:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Randy Hebert L20551443 Query Date: Jan 01, 2022

Transaction:

Transaction Status:

Approval Category: Hire - FT Non-Exempt Staff, JOBBW

Approval Ty

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* - indicates a required field.

Create a New Job, 499483-00 Custodian

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY*		<input type="text" value="01/01/2022"/>
Primary-Sec-OverId: *(Not Enterable)		<input type="text" value="P"/>
Job Begin Date: MM/DD/YYYY*		<input type="text" value="01/01/2022"/>
Annual Salary: *		<input type="text"/>
Timesheet Orgn: *	<input type="text"/>	<input type="text"/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Job Change Reason: *		<input type="text" value="Not Selected"/>

Remember! Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.

“L” Number:

- If this person has worked for LU in the past, he may already have an “L” number.
- If this person is a new hire (never worked at LU before), he may not have a Lamar ID or “L” number. Contact HR (hr@lamar.edu) for an “L” number.
- If this person is or was an LU student, he may already have a student “L” number. However, contact HR to activate this person as an employee. A student “L” number will not work for an EPAF.
- Certain fields will be Not Enterable &/or pre-populated.
- Pay Effective Date & Job Begin Date will match Query Date.
- Annual Salary is full annual amount, not portion of salary or hourly rate.

- Timesheet Orgn is the office this employee is joining and from whose budget the employee will be paid. Contact your business manager or hr@lamar.edu if clarification is needed.
- Job Change Reason is New Hire for a new Lamar employee. Contact your business manager or hr@lamar.edu if this person has worked for Lamar before.

Display Labor Distribution, 499483-00 Custodian

Current
 Effective Date: 01/01/2022
 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
 Effective Date: MM/DD/YYYY 01/01/2022

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
L	230231	110010	30231	610017	720					100.00			
Total:										100.00			

✓ Job Labor Distributions defaulted from the working Position Labor Distributions for fiscal year 2022, position 499483.
 Default from Index | Save and Add New Rows

- Do not change the settings in the Labor Distribution table.

Routing Queue

Approval Level	User Name
15 - (HRAPRV) HR Approver	<input type="text"/>
17 - (PAYROL) Payroll	<input type="text"/>
20 - (DEN-DR) VP or Dean	<input type="text"/>
79 - (BUDGET) Budget	<input type="text"/>
90 - (HR) Payroll - Apply	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>

Save and Add New Rows

Comment

Approval Types | A

Save

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- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should already be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.
- You may leave a comment in the Comment box.
- Remember to **SAVE** your work, or it will be lost.

2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete you work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “Hire - Graduate Assistant”

You may be asked to create an EPAF to hire a graduate assistant. This example walks you through the steps to create an EPAF for a graduate assistant.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the EPAF to hire a graduate assistant. Note the following:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Jane Doe L20551429 Query Date: Jan 01, 2022

Transaction:

Transaction Status:

Approval Category: Hire - Graduate Assistant, GRRH98

Approval Types | Routing C
New EPAF | Ret

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* - indicates a required field.

Employee Information

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code: (Not Enterable)	40, Graduate Assistant	<input type="text" value="40"/>
Home Organization:	20001, Provost & VP Academic Affairs	<input type="text"/>
Distribution Orgn:	20001, Provost & VP Academic Affairs	<input type="text"/>
Term Reason Code: (Not Enterable)	-	<input type="text" value="-"/>
Termination Date: MM/DD/YYYY(Not Enterable)	-	<input type="text" value="-"/>

Remember! Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.

“L” Number (things to watch out for):

- Because this graduate assistant (GA) is an LU student, she should already have a student Lamar ID or “L” number. However, contact HR (hr@lamar.edu) to activate this GA as an employee. A student “L” number will not work for an EPAF.
- If this GA is a new student & has not yet been assigned an “L” number, contact hr@lamar.edu for assistance.
- If this GA has worked for LU in the past (as an employee, not student), she may already have an employee “L” number. Contact hr@lamar.edu for assistance.



- Certain fields will be Not Enterable &/or pre-populated.
- Home Org and Distribution Orgn are typically the same and identify the office hiring the graduate assistant. In this example, the office is already listed (20001, Provost & VP Academic Affairs). Nevertheless, type the five-digit Org Code (20001) directly into the field, or click the Search icon (magnifying glass) to select this Org Code from the search list.
- If the Home Org and Distribution Orgn do not match, contact your business manager or hr@lamar.edu.
- Questions? Contact your business manager or hr@lamar.edu.

Create a New Job, 497980-00 Graduate Assistant

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Accrue Leave: (Not Enterable)		<input type="text"/>
Primary-Sec-Overld:	Primary	<input type="text"/>
Pay Effective Date: MM/DD/YYYY		<input type="text"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Title: (Not Enterable)		<input type="text"/>
Annual Salary:		<input type="text"/>
Hourly Rate: (Not Enterable)		<input type="text"/>
Timesheet Orgn:	<input type="text"/>	<input type="text"/>
Factor: *		<input type="text"/>
Pays: *		<input type="text"/>
Hours per Day: *		<input type="text"/>
Job Status:	Active	<input type="text"/>
FTE: *		<input type="text"/>
Job Change Reason:	B, Re-Hire	<input type="text"/>

End Job, 497980-00 Graduate Assistant

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)	T	<input type="text"/>
Job Change Reason: *	P, End of Assignment	<input type="text"/>



Under “End Job”:

- Pay Effective Date & Personnel Date are the date the assistantship officially ends.
- Job Change Reason: End of Assignment.

Under “Create a New Job”:

- Job Begin Date, Pay Effective Date & Personnel Date will all match Query Date. (**Remember!** Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.)
- Primary, Secondary & Overload: Review **Job Status** in Glossary.
- Annual Salary is full amount of the assistantship.
- Timesheet Orgn is typically the department or office paying the graduate assistant’s salary. However, since GAs may be paid from different sources (dept, College, business office, etc.), check with your business manager or hr@lamar.edu for clarification.
- Factor & Pays are the number of pay periods during the employee’s contract. Pay periods vary depending on the term or time period for which the GA is hired. Contact your business manager or HR to clarify as needed.
- Hours per Day & FTEs (Full Time Equivalent) vary depending on the term/time period for which the GA is hired & the type of work GA will be doing. Contact your business manager or HR to determine Hours per Day & FTEs.
- Job Change Reason: Will vary depending on whether GA is a new hire or has worked for LU before as a GA or in some other capacity. Contact your business manager or HR if you are unsure.

Routing Queue

Approval Level	User Name
15 - (HRAPRV) HR Approver	<input type="text"/>
17 - (PAYROL) Payroll	<input type="text"/>
20 - (DEN-DR) VP or Dean	<input type="text"/>
45 - (GRAD) Grad Studies/Sponsored Prog.	<input type="text"/>
50 - (PROVST) Provost	<input type="text"/>
79 - (BUDGET) Budget	<input type="text"/>
90 - (HR) Payroll - Apply	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>

Save and Add New Rows

Comment

Save

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Approve

- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should already be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.
- You may leave a comment in the Comment box.
- Remember to **SAVE** your work, or it will be lost.


2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete you work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “Hire - Student Assistant”

You may be asked to create an EPAF to hire a student assistant. This example walks you through the steps to create an EPAF for a student assistant.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the EPAF to hire a student assistant. Note the following:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Ryan Jones L20551442 Query Date: Dec 01, 2021



Transaction: **Transaction Status:**

Approval Category: Hire - Student Assistant, STREHI

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* - indicates a required field.

Employee Information

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code: (Not Enterable)	60, Student Assistant	<input type="text" value="60"/>
Home Organization:	30171, Student Financial Aid 	<input type="text"/>
Distribution Orgn:	30171, Student Financial Aid 	<input type="text"/>
Term Reason Code: (Not Enterable)		<input type="text" value="66"/>
Termination Date: MM/DD/YYYY		<input type="text"/>

Remember! Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.

“L” Number (things to watch out for):

- Because this student assistant (SA) is an LU student, he should already have a student Lamar ID or “L” number. However, contact HR (hr@lamar.edu) to activate this SA as an employee. A student “L” number will not work for an EPAF.
- If this SA is a new student & has not yet been assigned an “L” number, contact hr@lamar.edu for assistance.
- If this SA has worked for LU in the past (as an employee, not student), he may already have an employee “L” number. Contact hr@lamar.edu for assistance.



- Certain fields will be Not Enterable &/or pre-populated.
- Home Org and Distribution Orgn are typically the same and identify the office hiring the student assistant. In this example, the office is already listed (30171, Student Financial Aid). Nevertheless, type the five-digit Org Code (30171) directly into the field, or click the Search icon (magnifying glass) to select this Org Code from the search list.
- If the Home Org and Distribution Orgn do not match, contact your business manager or hr@lamar.edu.
- Termination Date is the date the student assistantship officially ends.

Student Job, 496422-00 Student Assistant

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Primary-Sec-Overld:	Primary	<input type="text" value="Primary"/>
Pay Effective Date: MM/DD/YYYY		<input type="text"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Title: (Not Enterable)		<input type="text"/>
Regular Rate:		<input type="text"/>
Hourly Rate: (Not Enterable)	0	<input type="text" value="0"/>
Timesheet Orgn:		<input type="text"/>
Job Status: (Not Enterable)	A	<input type="text" value="A"/>
FTE: *(Not Enterable)	0	<input type="text" value="0"/>
Job Change Reason:	L, Reappointment	<input type="text" value="L, Reappointment"/>

End Job, 496422-00 Student Assistant

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)	T	<input type="text" value="T"/>
Job Change Reason: *	P, End of Assignment	<input type="text" value="P, End of Assignment"/>



- Job Begin Date, Pay Effective Date & Personnel Date will all match Query Date. **(Remember!** Query date is the date the job/EPAF takes effect & becomes active and **not** the date you create the EPAF.)

- Primary, Secondary & Overload: Review **Job Status** in Glossary.

- For questions about Regular Rate & Hourly Rate, contact your business manager or hr@lamar.edu.

- Timesheet Orgn is typically the department or office paying the student assistant's salary. However, since SAs may be paid from different sources (dept, College, business office, etc.), check with your business manager or hr@lamar.edu for clarification.

- Job Change Reason: Will vary depending on whether SA is a new hire or has worked for LU before as a SA or in some other capacity. Contact your business manager or HR if you are unsure.



Under "End Job":

- Pay Effective Date & Personnel Date are the date the student assistantship officially ends.
- Job Change Reason: End of Assignment.

Routing Queue

Approval Level	User Name
15 - (HRAPRV) HR Approver	<input type="text"/>
17 - (PAYROL) Payroll	<input type="text"/>
20 - (DEN-DR) VP or Dean	<input type="text"/>
79 - (BUDGET) Budget	<input type="text"/>
90 - (HR) Payroll - Apply	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>

Save and Add New Rows

Comment

Approve

Save

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- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should already be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.
- You may leave a comment in the Comment box.
- Remember to **SAVE** your work, or it will be lost.

2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete your work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Create an EPAF for “End Job Assignment”

You may be asked to create an EPAF to end a job assignment for an LU employee. This example walks you through the steps to create an EPAF to end a job assignment.



Before creating this EPAF, review the section [How to Set Up a New EPAF](#). Do not create this EPAF until you have mastered that previous section.

1. Complete the New EPAF Person Selection and New EPAF Job Selection steps (review **How to Set Up a New EPAF** for instructions). The following screen will appear, where you will complete the EPAF to end a job assignment. Note the following:

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: John Doe, L20551430

Transaction: Query Date: Apr 30, 2022

Transaction Status:

Approval Category: End Job Assignment, TERMJB

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* - indicates a required field.

End Job, 443027-01 Hourly Worker

Item	Current Value	New Value
Pay Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)		T
Job Change Reason: *		Not Selected

- **Query Date** is the final day of the job assignment (example: if job ends on September 30, 2021, query date will be 09/30/2021).
- Certain fields will be Not Enterable &/or pre-populated.
- Pay Effective Date & Personnel Date are same date. Both are the final day of the job assignment (example: if job ends on September 30, 2021, date will be 09/30/2021).
- Job Change Reason: Select reason most suited to the job’s ending (i.e., transfer, promotion, resignation, military leave, etc.). If in doubt, contact your business manager or hr@lamar.edu for assistance. **Note!** Also leave a Comment in this EPAF stating reason the job is ending.

Important!

- End Job Assignment EPAFs do not always signal that an employee is leaving Lamar permanently (i.e., separating, being terminated from LU). Permanent separation/termination are multi-step processes. Although an End Job Assignment EPAF may initiate a permanent separation/termination, this EPAF may also indicate a transfer or promotion within LU, the end of one of two assignments at LU, the end of a specific task, etc.
- When an employee permanently separates/terminates from Lamar, it is important that all active “jobs” under this employee are ended. Be sure to enter an End Job Assignment EPAF for each active “job” a separating employee holds.

Questions? Contact your business manager or hr@lamar.edu.

Routing Queue

Approval Level	User Name
15 - (HRAPRV) HR Approver	<input type="text"/>
17 - (PAYROL) Payroll	<input type="text"/>
20 - (DEN-DR) VP or Dean	<input type="text"/>
79 - (BUDGET) Budget	<input type="text"/>
90 - (HR) Payroll - Apply	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>
Not Selected <input type="button" value="v"/>	<input type="text"/>

Comment

[Return to Top](#)

- For **Routing Queue**, review the section of this guide, [How to Create a Default Routing Queue](#).
- If you have already created a **Default Routing Queue**, this EPAF's approvers should already be listed under User Name. If you have not created a Default Routing Queue, you can select the approver names from this screen.
- For **End Job Assignment EPAFs**, leave a comment stating reason the job is ending (transfer to another department, promotion to another position, left LU voluntarily, layoff/reduction in force, etc.).
- Remember to **SAVE** your work, or it will be lost.

2. After entering all required information into the EPAF, click the Submit button at the top of the screen.

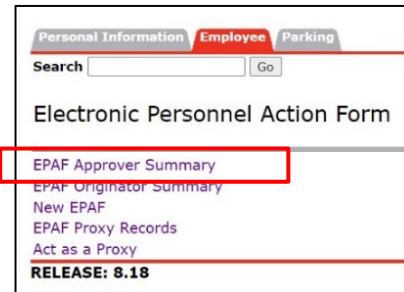
Notes:

- **Multiple Sessions.** If you want to work on your EPAF in more than one sitting, click Save. You will find your saved EPAF on your EPAF Originator Summary page. From that page, you can reopen the EPAF, edit or complete you work, and submit for approval.
- **Errors & Warnings.** If you click Save and receive an error or warning message, refer to the [EPAF Error & Warning Message List](#) on the [LU Budget](#) page. If you cannot resolve an error or warning on your own, contact your **business manager** or hr@lamar.edu.

How to Approve an EPAF

Approving an EPAF indicates that you have reviewed the EPAF submission, found it to be correct, and agree with the personnel action. If you are a designated EPAF **approver**, you can approve EPAFs as follows.

1. First, click EPAF Approver Summary on the main EPAF menu.



2. The EPAF Approver Summary page will appear, listing the EPAF submissions that require your approval. From this page, you can perform several actions.

You will find EPAFs waiting for your approval under the **Current** tab.

The screenshot shows the 'EPAF Approver Summary' page. At the top, there are tabs for 'Current', 'In My Queue', and 'History'. Below the tabs, there are status indicators and a queue status filter set to 'All'. A table titled 'EPAF Transactions' lists various transactions with columns for Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, Required Action, Action, and Links. At the bottom of the page, there are 'Select All', 'Reset', and 'Save' buttons. The 'Save' button is highlighted with a red box.

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Student Assistant, 495040-01	[Redacted]	44828	Hire - Student Assistant	Aug 06, 2021	Aug 06, 2021	Approve	<input type="checkbox"/>	Comments
Faculty Stipend, 442976-00	[Redacted]	45195	Faculty Stipend	Aug 12, 2021	Aug 12, 2021	Approve	<input type="checkbox"/>	**Comments Errors
Faculty Teach Overload-PRAC, 442836-00	[Redacted]	45057	Hire - Faculty Teaching Overload	Aug 11, 2021	Aug 11, 2021	Approve	<input type="checkbox"/>	**Comments
Research Assistant, 442636-00	[Redacted]	45307	Hire - Research Assistant	Aug 16, 2021	Sep 01, 2021	Approve	<input type="checkbox"/>	**Comments
Graduate Assistant, 442648-02	[Redacted]	45353	Graduate Assistant	Aug 16, 2021	Sep 01, 2021	Approve	<input type="checkbox"/>	Comments
One Time Pay/Large Census Pay, 494703-17	[Redacted]	44978	One Time Pay - Faculty	Aug 10, 2021	Aug 01, 2021	Approve	<input type="checkbox"/>	**Comments
Adjunct Teaching Instructor, 498884-22	[Redacted]	44714	Hire - Adjunct	Aug 03, 2021	Aug 03, 2021	Approve	<input type="checkbox"/>	**Comments
State Work Study, 443042-00	[Redacted]	45200	Work Study - State	Aug 12, 2021	Aug 12, 2021	Approve	<input type="checkbox"/>	Comments
Student Assistant, 496424-00	[Redacted]	45270	Hire - Student Assistant	Aug 13, 2021	Aug 07, 2021	Approve	<input type="checkbox"/>	**Comments
Student Assistant, 495040-01	[Redacted]	44762	Hire - Student Assistant	Aug 04, 2021	Aug 04, 2021	Approve	<input type="checkbox"/>	Comments

Names have been blocked for confidentiality. Clicking a name in your Approver Summary opens the EPAF for review.
(continued, next page)

*Always remember to **Save** your changes.*

EPAF Approver Summary

Current | In My Queue | History

Select the link under Name to access details of the transaction.

✓ You are acting as a Superuser.
 ✓ Filtering On
 Queue Status: All Pending

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser or Filter Transactions](#)
[Return to EPAF Menu](#)

1 - 25 of 361 [Next](#) [Jump to Bottom](#)

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Student Assistant, 495040-01		44828	Hire - Student Assistant	Aug 06, 2021	Aug 06, 2021	Approve	<input type="checkbox"/>	Comments
Faculty Stipend, 442976-00		45195	Faculty Stipend	Aug 12, 2021	Aug 12, 2021	Approve	<input type="checkbox"/>	**Comments Errors
Faculty Teach Overload-PRAC, 442836-00		45057	Hire - Faculty Teaching Overload	Aug 11, 2021	Aug 11, 2021	Approve	<input type="checkbox"/>	**Comments
Research Assistant, 442636-00		45307	Hire - Research Assistant	Aug 16, 2021	Sep 01, 2021	Approve	<input type="checkbox"/>	**Comments
Graduate Assistant, 442648-02		45353	Graduate Assistant	Aug 16, 2021	Sep 01, 2021	Approve	<input type="checkbox"/>	Comments
One Time Pay/Large Census Pay, 494703-17		44978	One Time Pay - Faculty	Aug 10, 2021	Aug 01, 2021	Approve	<input type="checkbox"/>	**Comments
Adjunct Teaching Instructor, 498884-22		44714	Hire - Adjunct	Aug 03, 2021	Aug 03, 2021	Approve	<input type="checkbox"/>	**Comments
State Work Study, 443042-00		45200	Work Study - State	Aug 12, 2021	Aug 12, 2021	Approve	<input type="checkbox"/>	Comments
Student Assistant, 496424-00		45270	Hire - Student Assistant	Aug 13, 2021	Aug 07, 2021	Approve	<input type="checkbox"/>	**Comments
Student Assistant, 495040-01		44762	Hire - Student Assistant	Aug 04, 2021	Aug 04, 2021	Approve	<input type="checkbox"/>	Comments

[Return to Top](#)
 **Comments Exist

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser or Filter Transactions](#)
[Return to EPAF Menu](#)

After clicking an employee's name to open an EPAF, you can review the full EPAF. Using the menu below, you can then **Approve**, **Disapprove**, **Return for Correction**, add/request **More Info**, or add a **Comment**.

Click **Comments** to add your comments to an EPAF.

Two asterisks (****Comments**) mean someone has already left a comment on that EPAF. Click ****Comments** to read the comment &, if you wish, add your own.

Click **Save** to save your comments.

EPAF Preview

Name and ID: [Redacted] Job and Suffix: [Redacted] Hourly Worker
 Transaction: [Redacted] Query Date: Oct 14, 2021
 Transaction Status: Pending Last Paid Date:
 Approval Category: Hourly Worker Rehire - Less than 50% FTE, HOURR1

Next [Next](#)

Comments

Enter a comment.

Name and ID: [Redacted]
 Transaction: [Redacted]
 Job and Suffix: 442836-00, Faculty Teach Overload-PRAC
 Approval Category: Hire - Faculty Teaching Overlo, FAOVER

Previous Comments
 Date: Aug 11, 2021 05:35:23 PM
 Made by: Stacie Marie Granger, SMGRANGER
 Comments: FTE = 0.10


Date: Aug 11, 2021 05:34:32 PM
 Made by: Stacie Marie Granger, SMGRANGER
 Comments: Overload - 2nd practicum section POT 1 (9/1-12/31), NURS 4381-13, \$3360, Enrollment=10, 96 hours

Enter Comment

- **Approve** accepts the EPAF & sends to next approver.
- **Disapprove** rejects the EPAF.
- **Return for Correction** sends EPAF back to originator for correction. Approvers should always include a comment explaining why EPAF is being sent back & what corrections are needed. After correction, EPAF must be approved by all approvers once again.
- **More Info** allows approver to add or request more information about EPAF. This option merely adds information & does not reject EPAF or return for correction. If approvers choose More Info, they should include a comment explaining their reasons.
- **Add Comment** allows approvers to add comments to EPAF. Useful for explaining decisions.

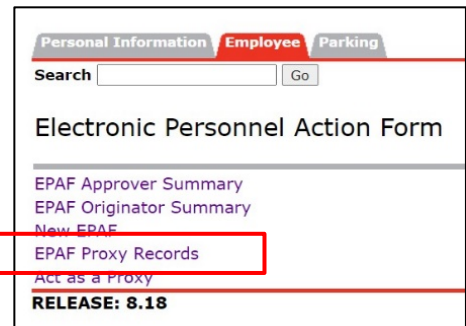
How to Select a Proxy

EPAF **approvers** can designate **proxies**, fellow employees who can approve EPAFs in their absence. Sharing the approval workload, proxies improve the EPAF process by making approvals more reliable and efficient.

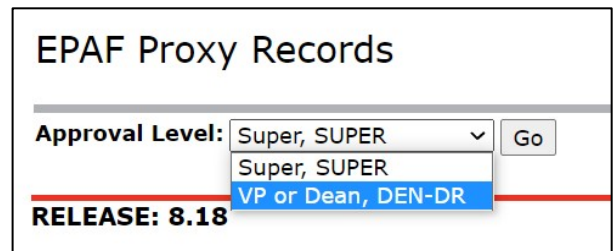


It is critical that approvers designate as proxies only those LU employees whom they trust and who are in their reporting chain or department.

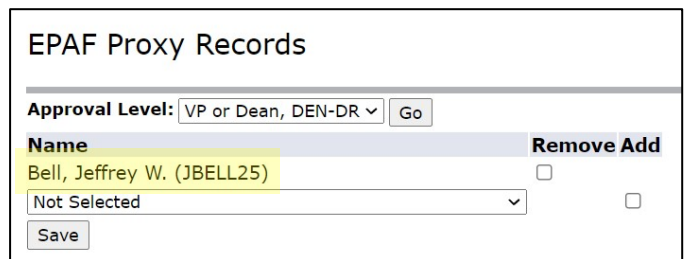
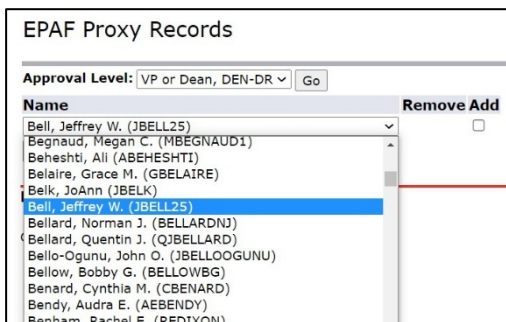
1. To choose a proxy, first select EPAF Proxy Records from the main EPAF menu.



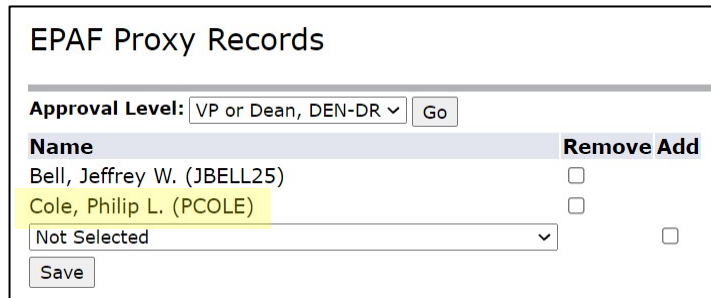
2. Next, on the EPAF Proxy Records page, select the Approval Level for which you want to designate a proxy. If you serve at only one Approval Level, you will have one choice. If you serve at multiple levels, you will have multiple choices. Select a level and click Go.



3. When the Name field appears, select a **trusted** employee to serve as your proxy. Check the Add box, then click Save. The employee will be added as your proxy.



- To add another proxy at this Approval Level, repeat the process of selecting a name, checking Add, and clicking Save. The second employee will be added as your proxy.



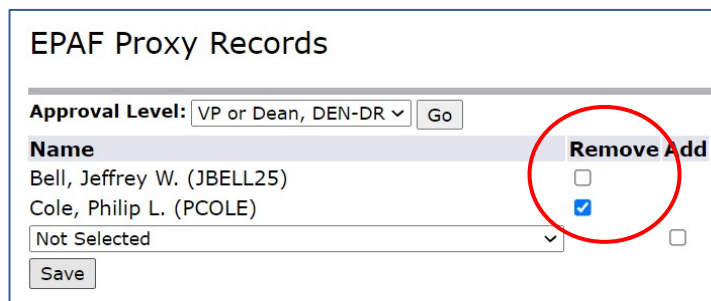
EPAF Proxy Records

Approval Level: VP or Dean, DEN-DR

Name	Remove	Add
Bell, Jeffrey W. (JBELL25)	<input type="checkbox"/>	<input type="checkbox"/>
Cole, Philip L. (PCOLE)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Not Selected

- To remove a proxy, check the Remove box next to the proxy's name, then click Save. The proxy will be removed.



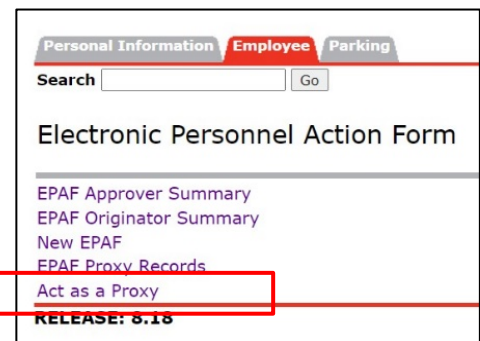
EPAF Proxy Records

Approval Level: VP or Dean, DEN-DR

Name	Remove	Add
Bell, Jeffrey W. (JBELL25)	<input type="checkbox"/>	<input type="checkbox"/>
Cole, Philip L. (PCOLE)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Not Selected

- Once you have chosen a proxy, this employee can select the link Act as a Proxy from the main EPAF menu to perform this important function in your absence.



Personal Information **Employee** Parking

Search

Electronic Personnel Action Form

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- EPAF Proxy Records
- Act as a Proxy**

RELEASE: 8.18

EPAF Help

<i>If type of problem occurs:</i>	Contact:
You cannot log in to Self-Service Banner (SSB)	LU Service Desk (409) 880-2222 servicedesk@lamar.edu
You do not have an EPAF link in your SSB but should have EPAF access	LU Budget Office (409) 880-2397 budget@lamar.edu
You receive an EPAF Error or Warning Code	<p>First, consult the EPAF Error & Warning Message List on the LU Budget page.</p> <p>If you cannot resolve an Error or Warning on your own, contact your Business Manager or LU Human Resources.</p>
If you have a Business Manager and have problems using the EPAF system (creating EPAFs, approving EPAFs, EPAF errors or warnings, etc.)	Your Business Manager
If you have NO Business Manager and have problems using the EPAF system (creating EPAFs, approving EPAFs, EPAF errors or warnings, etc.)	LU Human Resources(409) 880-8375 hr@lamar.edu

Appendix A: Approval Categories

- Change - Exempt Staff Salary
- Change - Faculty Salary
- Change - Funding Source
- End Job Assignment
- Hire - Adjunct
- Hire - Faculty Teaching Overload
- Hire - FT Exempt Staff
- Hire - FT Faculty
- Hire - FT Non-Exempt Staff
- Hire - Graduate Assistant
- Hire - Research Assistant
- Hire - Resident Assistant
- Hire - Student Assistant
- Hire - Summer Director/Chair
- Hire - Summer Research Faculty
- Hire - Summer Teaching Faculty
- Hire - Teaching Assistant
- Hire - Temporary Worker, less than 50% FTE
- One Time Pay - Faculty
- One Time Pay - Staff
- One Time Pay - Student Award
- Separation
- Stipend - Faculty
- Stipend - Staff
- Work Study - Federal
- Work Study – State

Appendix B: Glossary

TERM	DEFINITION
Annual Salary	In certain EPAFs, this will be the total annual salary of the employee. However, for One Time Pays (OTPs), stipends, adjunct (part-time) faculty, assistantships, & similar EPAFs, this will be the total amount paid for the OTP, stipend, course, assistantship, etc.
Applier	LU employee who applies an approved EPAF transaction in Banner. Appliers typically work in the Payroll Office.
Approval Category	A type of EPAF. Examples: Hire-Adjunct, Hire-Student Assistant, One Time Pay. An EPAF originator selects the Approval Category at the start of the process of creating an EPAF.
Approval Levels	The hierarchy or reporting structure in an organization. For example, an approval level may be Department Chair, Dean, Director, or Provost. People in that office authorized to sign off on an EPAF would belong to that approval level. Approval levels are included in an EPAF's Routing Queue.
Approval Queue	Go to Routing Queue.
Approver	An approver is an employee in the Routing Queue who must approve the EPAF. This person reviews the EPAF to ensure that the information about the employee, job, and funding is correct. If not correct or if there are questions, the approver may disapprove the EPAF, return it for correction, or request more information. If the EPAF is correct, the approver can approve the action, and the EPAF continues to the next person in the Routing Queue, either a higher-level approver or an applier.
Authorized EPAF User	LU employee who has been given access rights to the EPAF system and is authorized to create (originator), approve (approver), and/or apply (applier) EPAFs for a department, office, or other unit of the university.
Banner	Online system used by Lamar University employees for administrative tasks, including EPAF personnel actions.
Base Job Begin Date	This is the very first date a person worked in a given position number.
Business Manager	A business manager is a designated LU employee assigned to handle business and financial matters for an LU division or office. Not all LU divisions or offices have a business manager. All LU Colleges have a business manager while other, non-academic offices may not have a business manager or may be in the process of acquiring one. Business managers can offer essential help and guidance when employees in their College, division, or office are creating or approving EPAFs.
Comments	During the EPAF process, comments can be added or read by an EPAF originator or by any approver along the Routing Queue. Comments are added in an online box/field present on select EPAF pages.
Default Routing Queue	A Default Routing Queue enables an EPAF originator to enter the names of specific approvers into the Routing Queue included in a type (Approval Category) of EPAF. Although the approval levels in a Routing Queue are predefined, the name at each level is not. By entering the names once and saving this Default Routing Queue, the EPAF originator does not have to select the names each time s/he creates that type of EPAF.
Effective Date	The date an action takes effect or becomes active in Banner. For example, an EPAF with an effective date of 09/01/2021 will take effect or become active on September 1, 2021.

EPAF (Electronic Personnel Action Form)	An electronic form in Banner that initiates a personnel action for an LU employee. EPAFs replace paper forms and make the personnel process quicker and more efficient.
Factor/Pays	The number of pay periods over which a person is being paid for a given EPAF. Example: A full-time faculty member has nine pay periods (and receives nine paychecks) for the fall and spring semesters of a full-time faculty contract. Factor/Pays may vary depending on the type of job/EPAF. Thus, the Factor/Pays for an employee paid monthly will differ from the Factor/Pays for an employee paid bi-weekly.
Full-Time Equivalent (FTE)	Go to Job Status.
FYI	For Your Information. An action that can be designated for a person in the Routing Queue. An FYI allows the person to acknowledge an EPAF transaction (rather than approve) and does not delay the approval process.
Hours Per Pay	This EPAF entry is consistent with the FTE (Full-Time Equivalent) of the job. EPAF originators should work with their business manager or HR to determine the correct Hours Per Pay and FTEs for an EPAF.
Job Status	<p>In EPAF, Job Status relates to whether a job is an employee's Primary, Secondary or Overload job at Lamar University. Primary, Secondary & Overload are determined based on (1) whether the job is the employee's "first" job with the university, and (2) how many Full Time Equivalents (FTEs) the job equals or includes:</p> <ul style="list-style-type: none"> • Primary indicates that this job is the employee's "first" job with the university. For example, a full-time staff or faculty member's job would be the employee's Primary job as it is both the employee's "first" job and equals 1.0 FTE (=100%). For non-full-time employees (who may have more than one LU job), a Primary job is the first one for which the employee has been hired [i.e., the EPAF created for this job is the earliest (by Effective Date), active EPAF in this employee's account]. Thus, if an adjunct faculty member is teaching two adjunct courses, the first, active course for which a "Hire-Adjunct" EPAF has been created is the adjunct's Primary job. At two courses, this adjunct faculty member has not yet reached 1.0 FTE. • Secondary indicates that this job is the employee's second, active job at the university. For example, if an adjunct faculty member is teaching two courses, the first, active course for which a "Hire-Adjunct" EPAF was created is the adjunct's Primary job. The second, active course for which an EPAF was created is the Secondary job. Similarly, if a student worker holds two part-time LU jobs, the first, active job for which the student was hired is the Primary job, and the second, active job is the Secondary. An EPAF remains in Secondary status as long as the employee's FTEs have not equaled or exceeded 1.0 FTE (employee is <100%). • Overload indicates that an employee has exceeded 1.0 FTE and is now working over 1.0 FTE (over 100%) for the university. <p>Certain EPAFs do not conform to this formula, and, if unsure, EPAF originators should work with their business managers or HR to determine Job Status.</p>
"L" Number	Go to Lamar ID.
Lamar ID	Assigned to each Lamar University employee and student, an eight-digit identification number preceded by a capital L (example: L12345678). Also called Lamar User ID or "L" number.
LU Connect	Web page where LU employees can access multiple online resources, including Self-Service Banner. Accessed through Lamar web page or directly at luconnect.lamar.edu .
Originator	The person who creates an EPAF in Self-Service Banner and submits it for approval.
Overload	Go to Job Status.

Personnel Date	The true date that an action took effect (e.g., the true start date, termination date, or pay change date, etc.). Personnel date is equal to effective date in most cases.
Position Number	Six-digit code identifying a specific personnel action as well as the funding, classification, and home organization for that action. An updated Position Number List is published monthly on the LU Budget Office web page. EPAF originators use this list to correctly identify a personnel action and its funding source, classification, and home organization, Example: Position Number 495764 identifies a One Time Pay (OTP) funded by the Office of the Provost.
Primary	Go to Job Status.
Proxy	A designee who acts on behalf of an EPAF approver or applier.
Query Date	The date an EPAF takes effect or becomes active. Same as the Effective Date. When creating an EPAF, the originator enters the Query Date. The Query Date is NOT the date an EPAF is created. Query Date is the date an EPAF takes effect or becomes active.
Queue Status	<p>The current routing status of the EPAF with regard to the individual defined in the Routing Queue. The Queue statuses are as follows:</p> <ul style="list-style-type: none"> • In the Queue – the EPAF is on its way to the approver, but it requires an action prior to reaching that approver. • Pending – the EPAF is ready for action by the approver. • Approved – the EPAF has been approved by the approver. • FYI – the transaction is for information only. A person can acknowledge the EPAF transaction, but no action on that person’s part is required for the transaction to continue moving through the Routing Queue. • Acknowledge – the person listed as FYI has viewed the EPAF transaction. • Applied – the EPAF has been applied to Banner by the Payroll Office. • Disapproved – the EPAF has been disapproved by the approver. • Return for Correction – the EPAF has been returned to the originator for correction. • More Information – a person in the Routing Queue with a required action of Approve needs more information before approving the transaction. • Removed from Queue – this system-generated status will appear for all approvers remaining in the queue for an EPAF that was voided or disapproved and never reached them. • Void – the EPAF has been voided by the originator.
Routing Queue	Also called an Approval Queue. A predefined Routing Queue included in each type of EPAF. Each Routing Queue has a series of predefined, mandatory Approval Levels, a hierarchy or reporting chain that must approve, disapprove, return for correction, or apply the EPAF action. The Routing Queue ensures that an EPAF is approved by the individuals in the reporting chain responsible for the personnel action.
Secondary	Go to Job Status.
Self-Service Banner (SSB)	Web portal to Lamar’s Banner system, where employees can perform Banner tasks on their own (thus, “self-service”). The EPAF system is accessed through Self-Service Banner.
Transaction Number	A unique number for an EPAF transaction, assigned by Banner.
Transaction Status	<p>The current status of the EPAF itself. This status is the more relevant status for an originator. It is displayed in the EPAF Originator Summary and at the top of each EPAF transaction. The transaction statuses are:</p> <ul style="list-style-type: none"> • Waiting – the EPAF transaction is in the process of being created by the originator and has not yet been submitted for approval. The EPAF will not appear on the EPAF Approver Summary while in waiting status. • Pending – the EPAF requires action by the approver(s).

- | | |
|--|--|
| | <ul style="list-style-type: none">• Approved – the EPAF has been approved by the approver(s) defined in the Routing Queue. The EPAF has not yet been applied by the Applier.• Complete – the EPAF has been applied to Banner by the Payroll Office.• Return for Correction – the approver returned the EPAF to the originator for correction. The originator will need to update the EPAF and submit it for approval again.• Disapproved – the EPAF has been disapproved by the approver.• Void – the EPAF originator has voided the EPAF transaction. A Comment should be added to the EPAF explaining why the EPAF has been voided. |
|--|--|